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This Think Tank Review* covers articles and reports published in December 2019 relating to different political and policy topics. ([Twitter link](#))

The 'geopolitical Commission' of President von der Leyen is taking office in politically challenging times for the **EU institutions**. Various think tanks stress her ambitious goals on environmental and digital policies and her aim of uniting the bloc around the objective of boosting the EU's role in the world. The Lisbon Treaty is analysed since its implementation 10 years ago.

Publications look at the **European Green Deal**, how the EU is set to achieve the sustainable development goals and how to incorporate sustainability in CAP reforms. They unpack multiple political projects that make up the Deal and look at how financial resources should be dedicated to climate adaptation. Several explore the related economic and societal challenges for Central European countries and beyond.

Reports analyse the development of EU **competitiveness** which can help to preserve Europe's economic sovereignty by a new industrial policy based on 'European champions', able to compete with the US and China.

On **social affairs**, the 2019 social justice index report investigates opportunities for social participation in EU and OECD countries; as regards **education**, the size of the Erasmus+ programme will determine the EU's ambition since the programme is a major player and influencer of the young generation.

On **general affairs**, the EU budget negotiations are discussed together with the question of the EU's own resources so that the EU will be able to react to the growing global instability, migration flows or terrorism.

In the field of **justice and home affairs**, human rights and democracy are regarded as an interconnected and mutually reinforcing duo; the rule of law question is considered likely to become a central EU issue for the new Commission.

On **foreign affairs**, reports comment on priorities for the new EU High Representative; the 'geopolitical Commission' and 'technological sovereignty' for the Union in strategic sectors; NATO's operational future over the coming decades; the future of the EU's Eastern Partnership beyond 2020; and how the Green Deal is also linked to foreign policy. Several publications analyse the WTO existential crisis and how to salvage its ability to settle trade disputes. Others examine the Arab Spring 2.0, throwing light on the protests sweeping the region and the workforce asymmetries in the Middle East and North Africa region that youthful populations are facing.

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FONDATION ROBERT SCHUMAN

With Ursula von der Leyen, the Commission of "new opportunity"

by Eric Maurice [@er1cmau](#)

On 1 December 2019, the European Commission chaired by Ursula von der Leyen entered office for a five-year term. This paper gives a thorough overview of the composition of the new Commission (East/West balance, influence of the member states, veterans vs rookies, ...). It summarises the priorities and lists the biggest challenges facing the new Commission, e.g. a fragmented Parliament. (10 p.)

POLISH INSTITUTE OF INTERNATIONAL AFFAIRS

The von der Leyen Commission: searching for balance in Europe

by Marta Makowska [@mMakowska](#), Melchior Szczepanik and Jolanta Szymańska [@jola_szymanska](#)

In the increasingly politically fragmented Union, the new Commission will be a more collegial institution, as the President von der Leyen finds herself obliged to share power with a trio of influential executive vice-presidents. Seeking to cement the initially fragile support for her, she built a team of commissioners with the aim of maintaining a balance in terms of the political influence of various actors and the approach to policies. With the call for a "geopolitical Commission", she aimed to unite the bloc around the objective of boosting the EU's role in the world. Von der Leyen's success will depend on her ability to translate the general political

balance into concrete proposals that will bridge the internal divides. (6 p.)

KÜLÜGYI ÉS KÜLGAZDASÁGI INTÉZET (INSTITUTE FOR FOREIGN AFFAIRS AND TRADE)

Political restart in Brussels: the growing challenges for the new European Commission in uncertain times

by Nikolett Garai, Attila Kovács, Tamás Levente Molnár et al.

The new Commission is taking office in politically challenging times. It is structured in a way that the Commissioners rely on each other heavily and are thus forced to make constant compromises. The new Commission President has set ambitious goals and wants to put more emphasis on environmental and digital policies and plans to lead a "geopolitical" Commission instead of the former "political" one. The success of the new President's efforts will depend on, inter alia, her ability to lower the level of tension among the member states and resolve mutual blockages between the EU institutions. (15 p.)

SVENSKA INSTITUTET FÖR EUROPAPOLITISKA STUDIER (SWEDISH INSTITUTE FOR EUROPEAN POLICY STUDIES)

The Lisbon Treaty 10 years on: success or failure?

by Anna Södersten (ed.), R. Daniel Kelemen
[@rdanielkelemen](#), Luuk van Middelaaar
[@LuukvMiddelaaar](#) et al.

In December 2009, the Lisbon Treaty entered into force, aiming at making the EU more democratic, more transparent and more efficient. In this anthology, four scholars analyse the institutional and constitutional changes that the Lisbon Treaty has brought. It examines whether the Treaty has strengthened the EU during the past decade. (108 p.)

KONRAD-ADENAUER-STIFTUNG

Ein flexibler Kompromiss – Der Europäische Rat trägt den European Green Deal mit

by Hardy Ostry, Ludger Bruckwilder, Kai Gläser et al.

At the December 2019 European Council meeting, under the leadership of the new President Charles Michel, the focus was on climate. With the Green Deal, the new Commission has presented an ambitious political strategy that most heads of state and government were willing to support. However, the hard struggle of this summit has shown that great efforts will need to be made in financing to take all member states on the way to a climate-neutral continent. With regard to the multiannual financial framework, the member states were again unable to make any substantial progress and commissioned Charles Michel to continue negotiations. The June summit will probably have to make strategically important decisions. (DE - 8 p.)

WILFRIED MARTENS CENTRE FOR EUROPEAN STUDIES

East versus West in focus: is there such a thing as a European society?

by Michael Benhamou  [@MichaelBenha](#)

The East-West divide in the EU has recently received much attention. While certain national leaders on both sides have tried to capitalise on it politically, data on the attitudes of the general public in the two subregions convey a more complex picture. This paper analyses European polling data on people's attitudes regarding several key societal questions. It concludes that the opinions of Western and Eastern European populations are in fact converging on key societal issues, and that EU policies should reflect this growing consensus. (12 p.)

EUROPEUM

Representation of the regions in the European Union: the V4 experience

by Patrik Kováč

Apart from national governments, interests of the citizens could be also represented by regional and local authorities. The EU offers several possibilities to promote and advocate interests of regions. The only formal institution with direct representation of the regional and local politicians is the European Committee of the Regions. This paper examines what is the place of the regions in the EU policy-shaping process with the specific focus on the regions of the Visegrad four countries. (9 p.)

NOTRE EUROPE - JACQUES DELORS INSTITUTE

What is the scope of the EU external competence in the field of energy today?

by Chrysanthi Tramountana

This paper argues that in the field of energy the Commission should not be shy in defending EU positions in respect of third countries by using the collective power of the EU, through international negotiations. (9 p.)

FONDATION ROBERT SCHUMAN

Speaking European

by Stefanie Buzmaniuk  [@SBuzmaniuk](#)

The EU is neither a State nor an international organisation like any other. From the outset its unique character demanded the creation of a language regime that would meet particularly high standards. This paper gives an overview of the historical reasons justifying the choice of a multilingual language regime and presents the current regulation of multilingualism in the EU treaties. Listing the numerous challenges posed by the over representation of English as the new EU lingua franca, this report finally puts forward a set of proposals for "true European multilingualism". (6 p.)



AGRICULTURE AND FISHERIES

INSTITUTE FOR EUROPEAN ENVIRONMENTAL POLICY

Getting to the roots of sustainable land management

by Stephen Meredith

The Commission's proposals for CAP reform present new opportunities to put environmental and climate action at the heart of the next CAP. As the policy has the potential to create powerful incentives and disincentives that affect land management decisions, it can, therefore, play an influential role in how farmers and land managers respond to key environmental and climate challenges including soil health. This paper provides inter alia an overview of the policy instruments most relevant to support more sustainable land management. It shows that post-2020 reform could deliver much-needed climate and environmental improvement. (15 p.)

COMPETITIVENESS (INTERNAL MARKET, INDUSTRY, RESEARCH AND SPACE)

BRUEGEL

How can European competition law address market distortions caused by state-owned enterprises?

by Mathew Heim [@MathewHeim](#)

This contribution assesses whether European competition law could be applied more directly to state-owned enterprises that

create an unlevel playing field in Europe because of the support they receive from their home governments. This issue has become a priority for many EU countries and for the Commission, given its impact on European economic autonomy. Competition law may not be the appropriate tool for addressing the granting of illegal subsidies or other forms of support in third countries, but it could be more effective in dealing with the distortive effect of state-owned entities on the EU internal market. (9 p.)

HERTIE SCHOOL - JACQUES DELORS INSTITUTE

The economics of European sovereignty: what role for EU competition policy in industrial policy?

by Kris Best [@KrsBest](#)

The new Commission aims to develop a new European industrial strategy. Some member states have called for an EU competition policy to support this strategy by allowing the formation of 'European champions' that are better able to compete with US and Chinese corporate giants. Especially in digital technology sectors, where European firms are falling behind, this is increasingly viewed as a question of preserving Europe's economic sovereignty. Should EU competition policy feed into industrial policy and support 'European champions'? What reforms does EU competition policy need, if any? (7 p.)

EUROPEAN CENTRE FOR DEVELOPMENT POLICY MANAGEMENT

Sewing the pieces together: towards an EU strategy for fair and sustainable textiles

by Nadia Ashraf and Jeske van Seters
[@JeskeVanSeters](#)

The report assesses various policy measures and explores how the EU can enhance synergies between different policy areas. It includes an analysis of EU-wide human rights and environmental due diligence legislations, policy measures related to market access to the EU, an ecodesign-style approach for textiles, and an

EU level multi-stakeholder initiative for sustainable textiles. (40 p.)

ECONOMIC AND FINANCIAL AFFAIRS

BRUEGEL

Impediments to resolvability of banks

by Alexander Lehmann

This paper gives an overview of the seven aspects of resolvability defined in 2019 by the single resolution board, and then assesses progress in two key areas, based on evidence gathered from public disclosures made by the 20 largest euro-area banks. The largest banks have made good progress in raising bail-in capital. Changes to banks' legal and operational structures that will facilitate resolution will take more time. Greater transparency would make it easier to achieve the policy objective of making banks resolvable. (31 p.)

NOTRE EUROPE - JACQUES DELORS INSTITUTE

Is central bank independence an obsolete concept?

by Pierre Jaillet [@JailletPierre](#)

This policy paper focuses on the independence of central banks. Central banks are now drawing fierce criticism, to the extent that they must sometimes take on the role of scapegoat for policies for which they had to offset the inadequacies. In addition to their statutory obligations and a form of communication that is often highly formatted, central banks should now meet the increased requirements of transparency and accountability, more in line with their actual responsibilities. This paper makes some proposals as to how this may be achieved. (11 p.)

BRUEGEL

The next generation of digital currencies: in search of stability

by Grégory Claeys and Maria Demertzis
[@mariademertzis](#)

The use of cash as a medium of exchange has declined and distributed ledger technology has led to the emergence of digital cryptocurrencies. Some global tech giants are planning to provide private digital currencies to their billions of users in the form of stablecoins; in turn, public authorities are thinking about providing their own digital currencies to the general public. This contribution focuses on the consequences stablecoins and central bank digital currencies could have. (12 p.)

INSTITUT FÜR WELTWIRTSCHAFT KIEL (KIEL INSTITUTE FOR THE WORLD ECONOMY)

The EU self-surplus puzzle: an indication of VAT fraud?

by Martin T. Braml and Gabriel J. Felbermayr

The authors show that the self-surplus of the EU amounts to a striking 307 billion euro in 2018. It persists in goods, services, and secondary income accounts. It also exists within the euro area, and is strongest between neighbouring countries. Around the 2004 Eastern enlargement the EU's self-surplus quadrupled. Balance of payments data from the UK appear highly distorted. The phenomenon is not only due to measurement error. Rather, a large fraction of the EU's self-surplus puzzle seems related to fraud in value added tax. The loss in tax income could amount to as much as 64 billion euro per year. (41 p.)

CENTRUM FÜR EUROPÄISCHE POLITIK (CENTRE FOR EUROPEAN POLICY)

10 years of redistribution between the EU member states

10 Jahre Umverteilung zwischen den EU-Mitgliedstaaten

by Matthias Kullas, Karen Rudolph and Muhammed Elemenler

The study calculates redistribution between the EU countries, from 2008 to 2017, through the EU budget, financial assistance institutions and the European Investment Bank. The EN version is a short summary of the study in DE. (EN - 8 p. / DE - 128 p.)

EDUCATION / YOUTH / CULTURE / SPORT

EUROPEUM

The size of Erasmus+ will determine the EU ambition in education

by Karel Barták

Education is an area in which the EU holds nearly zero competences as it falls fully under the subsidiarity principle. The EU cannot impose or infringe upon the structure of educational systems, curricula or even teaching itself. Education is solely the purview of member states' governments. The EU does, for instance, not interfere in decisions about the duration of secondary schools or about the subjects imposed for compulsory final exams. And yet, with the Erasmus+ programme, the EU is a major player in education and influencer of the young generation. (5 p.)

EMPLOYMENT / SOCIAL POLICY / HEALTH AND CONSUMER AFFAIRS

EUROPEAN POLICY CENTRE

The future of work: towards a progressive agenda for all

by Claire Dhéret [@cdheret](#), Simona Guagliardo
[@s_guagliardo](#) and Mihai Palimariciuc
[@MPalimariciuc](#)

Europe's labour markets and the world of work in general are being transformed by the megatrends of globalisation, the fragmentation of the production and value chain, demographic ageing, new societal aspirations and the digitalisation of the economy. This paper presents the findings and policy recommendations of the research project "The future of work – Towards a progressive agenda for all". Its main objectives were to expand public knowledge about these profound changes and to reverse the negative narrative often associated with this topic. (68 p.)

EUROPEAN TRADE UNION INSTITUTE

Digital labour in Central and Eastern Europe: evidence from the ETUI Internet and platform work survey

by Agnieszka Piasna and Jan Drahokoupil
[@jan_drahokoupil](#)

This paper presents the results of a survey conducted in Bulgaria, Hungary, Latvia, Poland and Slovakia in 2018-2019. The authors objectives were to map the extent of digital labour in central and eastern Europe based on the analysis of two types of online sources for generating income: internet work; and its subset, platform work. The researchers did not find evidence that internet and platform work is creating a qualitatively new labour market that encroaches on traditional age and gender segmentations. (47 p.)

BERTELSMANN STIFTUNG

Social justice in the EU and OECD: Index report 2019

by Thorsten Hellmann [@th_hellmann](#), Pia Schmidt and Sascha Matthias Heller

The social justice index investigates opportunities for social participation in the 41 EU and OECD countries on the basis of 46 quantitative and qualitative criteria. The index examines six dimensions of social justice: poverty, education, the labour market, intergenerational justice, health, and social inclusion and nondiscrimination. (269 p.)

ЦЕНТЪР ЗА ИЗСЛЕДВАНЕ НА ДЕМОКРАЦИЯТА (CENTER FOR THE STUDY OF DEMOCRACY)

Shady business: uncovering the business model of labour exploitation

by Anton Kojouharov, Atanas Rusev, Simone Eelmaa et al.

Trafficking for labour exploitation is driven by the opportunity to make profit and in many cases businesses benefiting from this crime are not restricted to criminal organisations. It is often a chain of legitimate businesses that engage in labour exploitation, both knowingly and unknowingly. This toolkit describes the business model of trafficking for labour exploitation outlining how different legitimate business structures are used to conceal and further this crime. The model is developed based on data collected in Bulgaria, Estonia, Finland and Latvia. (35 p.)

ENVIRONMENTAL ISSUES

EUROPEAN CENTRE FOR DEVELOPMENT POLICY MANAGEMENT

Boosting EU climate finance: mitigate more without neglecting adaptation in poorer countries

by Pamela Ahairwe [@PamellaEunice](#) and San Bilal [@SanBilal1](#)

The authors argue that although global climate financing has increased by 60% over the period 2013-2018, this is not enough. The article looks at the European Green Deal

and how the EU is set to achieve the sustainable development goals. It argues that resources should be dedicated to climate adaptation, which has been neglected, in particular by European finance institutions. (8 p.)

E3G

Delivering climate neutrality: accelerating EU decarbonisation with research and innovation funding

by Joseph Dutton [@JDuttonUK](#) and Lea Pilsner [@Lea_Pilsner](#)

Climate and energy-related research and innovation has an essential role to play in the EU's deep decarbonisation, as part of the long-term climate strategy and European Green Deal flagship policy. (17 p.)

E3G

How the European Green deal will succeed or fail

by Jonathan Gaventa [@jonathangaventa](#)

This paper unpacks multiple political projects that make up the European Green Deal and looks at how the underlying politics of the Deal could succeed or fail. (22 p.)

EUROPEUM

EU climate policy as a challenge for Central Europe

by Ryszarda Formuszewicz [@Formuszewicz](#)

The increased level of EU ambition with regard to climate policy has become a serious challenge for Central European countries as far as the long-term economic and societal implications of such a development are concerned. The aim of this paper is to present societal and economic aspects that contribute to the cautious position of these countries towards the new European climate agenda, and in particular to Poland's request for more time with regards to climate neutrality by 2050. (7 p.)

FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH EBERT FOUNDATION)

Social consequences of climate change: building climate friendly and resilient communities via transition from planned to market economies

by George Safonov

Global climate change is one of the most dangerous threats to human society in the 21st century. The Central and Eastern Europe, Caucasus, and Central Asia (CEECCA) region experiences many negative impacts of global warming, at a faster rate than the world average. Numerous adaptation and resilience measures are required to protect people, but regional governments often underestimate and ignore the social implications of climate policies. This paper explores the priority challenges for CEECCA countries and how to address them effectively. (28 p.)

LSE INSTITUTE OF GLOBAL AFFAIRS/ LSE GRANTHAM RESEARCH INSTITUTE ON CLIMATE CHANGE AND THE ENVIRONMENT

From 'green' to 'blue finance': integrating the ocean into the global climate finance architecture

by Erik Berglof [@ErikBerglof](#) Torsten Thiele [@tors10th](#), Alex David Rogers et al.

The solution to fight climate change is well known: rapid decarbonisation. The ocean can play an active role in this global effort. The ocean is not only a victim of climate change, but also part of the solution. To address the current challenges to the health of the Ocean, urgent policy action is required, including comprehensive governance and finance measures. (30 p.)

GENERAL AFFAIRS

FONDATION ROBERT SCHUMAN

Budget debate: the battle for the 1% threshold

by Nicolas-Jean Brehon

Once again, the budgetary negotiation of the Multiannual Financial Framework (MFF) is focused on the overall level of the European budget, or more precisely its relative share in the Union's gross national income (GNI). The 1% threshold of the GNI is again the centre of debate. This paper first outlines both the importance of the 1% threshold in politico-economic terms and the tensions that arise from the negotiations on this topic. This report focuses then on the specific features of the negotiations for the 2021 / 2027 MFF, such as the consequences of Brexit, and gives a state of play on the current state of the negotiations. (8 p.)

BRUEGEL

A new look at net balances in the European Union's next multiannual budget

by Zsolt Darvas [@ZsoltDarvas](#)

Whenever the EU's budget is discussed, much of the political focus is on net balances – whether countries pay in more than they receive – rather than on the broader overall positive effects of EU spending. This paper estimates the impact on net balances of the 2018 Commission MFF proposal, under three scenarios: elimination of rebates for all of the 2021-2027 new budget period, gradual elimination of rebates and non-elimination of rebates. The calculation also takes into account the estimated net contribution of the UK to the 2021-2027 EU budget based on the draft EU-UK withdrawal agreement. (33 p.)

EUROPEUM

The future of EU finances: new own resources

by Markéta Mlčúchová

Reform of the EU budget is not necessarily of a technical character, rather it is a response to the growing Euroscepticism and populism within member states. Besides restoring the citizens' confidence and belief in the EU, it is necessary to ascertain that the EU budget is prepared and sufficiently agile to react to the growing global instability, migration flows, terrorism, and to ensure both internal and external security, combat climate change and the financial drop caused by the exit of the UK. (8 p.)

HEINRICH-BÖLL-STIFTUNG (HEINRICH BÖLL FOUNDATION)

Western Balkan 6 strategy group: for an effective EU-enlargement policy

by Petar Todorov, Izabela Kisić, Fisnik Korenica et al.

The authors argue that there are three issues facing both the Croatian and German EU presidencies: the way the EU manages to keep positive reform momentum after the negative decision on North Macedonia and Albania of October 2019; the way the EU handles its facilitation role in the Serbia-Kosovo "normalization process"; and the way Croatia behaves towards its immediate neighbour Bosnia-Herzegovina. (9 p.)

JUSTICE AND HOME AFFAIRS

HEINRICH-BÖLL-STIFTUNG (HEINRICH BÖLL FOUNDATION)

To be equal and free: the nexus between human rights and democracy

by Thandiwe Matthews

Human rights and democracy are regarded as an interconnected and mutually reinforcing couple. The link between the concepts of democracy and human rights stems from the fact that human rights are one of the basic tenets of democracy. This paper seeks to explore the role of human rights in democracy, and specifically whether human

rights are necessary ingredients for its sustenance. The paper considers whether the delivery of human rights is a consequential outcome of liberal democracy. (29 p.)

EUROPEAN POLICY CENTRE

Poisoned heritage for the new Commission: the rule of law question

by György Fóris

The rule of law question will most likely become a central EU issue during the mandate of the new Commission. Member states are increasingly beginning to question, attack and/or ignore previously agreed common policies, political priorities or common principles. These challenges are usually more political – sometimes even ideological – than legal, thus the Commission's legalistic reactions are not necessarily adequate. (12 p.)

EUROPEAN POLICY CENTRE / FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH EBERT FOUNDATION)

Moving beyond the 'crisis': recommendations for the Commission's communication on migration

by Katharina Bamberg  @KatBamberg

This paper argues that the Commission's use of the crisis narrative has not been accurate, neither as a description of past phenomena nor as way to address citizens' concerns. Rather, it served the purpose of framing migration as a security issue and legitimised restrictive policy measures meant to 'tackle the crisis'. These included, for instance, ramped up border controls or increased cooperation with third countries to curb migration. This paper argues that the Commission should abandon the crisis narrative and develop a more proactive and diversified communication strategy instead. (24 p.)

EUROPEUM

EU MONITOR - An arduous path: are Bulgaria, Croatia and Romania ready to join the area?

by Žiga Faktor

The concept of free movement between European countries, manifested in the creation of the borderless Schengen area, is arguably one of the great achievements of European integration. Decision on the dissolution of state borders is a positive step for economic development and regional integration but raises also questions and challenges on the topic of security and compliance with rules and conditions set in the agreement. This article focuses on the accession of Croatia, Bulgaria and Romania to the Schengen area and discusses the main difficulties and obstacles for each country. (8 p.)

EUROPEAN STABILITY INITIATIVE

How to implement the EU-Turkey statement phase II: key facts and key steps

This publication discusses the best way to implement the 2016 EU-Turkey statement, which aims to end irregular migration flows from Turkey to the EU. It identifies key priorities for this winter for the EU's irregular migration policy, which include ending the humanitarian emergency on the islands, avoiding a new humanitarian emergency on the mainland, and reducing the number of people crossing the Balkan route. It also offers suggestions on how to achieve this. (20 p.)

TRANSPORT / TELECOMMUNICATIONS / ENERGY

BRUEGEL

The European Union-Russia-China energy triangle

by Georg Zachmann [@GeorgZachmann](#)

Concern is growing in the EU that a rapprochement between Russia and China

could have negative implications for the EU. This paper argues that energy relations between the EU and Russia and between China and Russia influence each other. It analyses their interactions in terms of four areas: oil and gas trading, electricity exchanges, energy technology exports and energy investments. (11 p.)

ENERGIEWIRTSCHAFTLICHES INSTITUT AN DER UNIVERSITÄT ZU KÖLN (INSTITUTE OF ENERGY ECONOMICS AT THE UNIVERSITY OF COLOGNE)

The trilateral gas talks. What would an interruption of Russian gas exports via Ukraine mean for EU consumers?

by Simon Schulte, Eren Çam and Max Schöfnisch

Gas supplies are secured for this winter – even if the current negotiations between the EU Commission, the Russian company Gazprom and the Ukrainian company Naftogaz over gas supplies from Russia via Ukraine to Europe should fail. Ten years after the Russian-Ukrainian gas conflict, the current gas supply contract expires at the end of the year. This study examines how a failure of the negotiations and a resulting interruption of gas supplies, as in 2009, would affect consumers in Europe. (26 p.)

E3G

EU energy system decarbonisation policy: breaking the logjam

by Lisa Fischer [@FactFishing](#) and Simon Skillings [@skillingssa](#)

The objective of achieving net zero emissions of greenhouse gases by mid-century places even greater importance on rapidly decarbonising the energy system. Avoiding a potential 'decarbonisation logjam', where uncertainty over the future prevents investment in important infrastructure, must be a key priority for both the new Commission and member state governments. (14 p.)

CENTRUM FÜR EUROPÄISCHE POLITIK (CENTRE FOR EUROPEAN POLICY)

Carbon pricing in France & Germany: differences, similarities and perspectives

by Ola Hanafi, Marion Jousseau, Martin Menner [@martinpennner](#) et al.

This study looks at the policies and instruments for carbon pricing that are applied in France and Germany. It describes the basic approach of carbon pricing and the instruments by which it can be implemented: carbon tax or emissions trading. It deals in detail with the provisions and instruments for carbon pricing applied in France and Germany, draws conclusions from this comparative analysis and provides a brief outlook on potential developments within the EU. (26 p.)

BRUEGEL

Bridging the divide: new evidence about firms and digitalisation

by Reinhilde Veugelers [@R_Veugelers](#), Désirée Rückert and Christoph Weiss

Using new evidence on the digitalisation activities of firms in the EU and the US, this paper documents a trend towards digital polarisation based on firms' use of the latest digital technologies and their plans for future investment in digitalisation. A substantial share of firms are not implementing any state-of-the-art digital technologies and do not have plans to invest in digitalisation. However, there is also a substantial share of firms that are already partially or even fully implementing state-of-the-art digital technologies in their businesses and that plan to further increase their digitalisation investments. (13 p.)

STIFTUNG WISSENSCHAFT UND POLITIK (GERMAN INSTITUTE FOR INTERNATIONAL AND SECURITY AFFAIRS)

Europe's third way in cyberspace. What part does the new EU cybersecurity act play?

by Annegret Bendiek [@annegretbendiek](#) and Martin Schallbruch

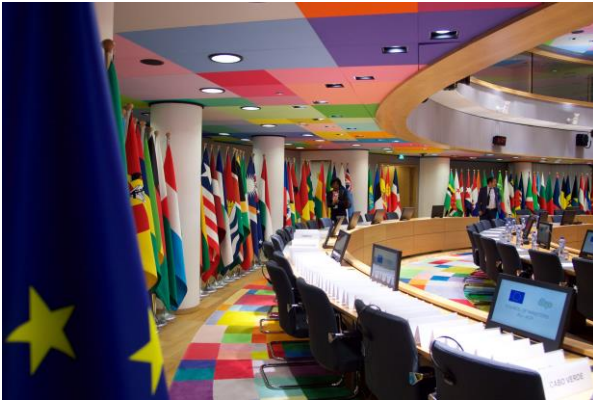
Cybersecurity has become a key issue for Europe in the global digital transformation. The EU cybersecurity act lays down a legal framework whose aim is to achieve global reach. Embedded in a policy that combines digital sovereignty with strategic interdependence, the act could represent the gateway to a third European pathway in cyberspace, something in between the US model of a liberal market economy and the Chinese model of authoritarian state capitalism. (8 p.)

OPEN POLITICAL ECONOMY NETWORK

Ever cleverer Union: how AI could help EU institutions become more capable, competent, cost-effective and closer to citizens

by Philippe Legrain [@plegrain](#) and Hosuk Lee-Makiyama [@leemakiyama](#)

Europe's productivity performance is woefully inadequate. But the development and deployment across the economy of artificial intelligence (AI) tools could provide a big boost, benefiting citizens, businesses and public administrations – not least the EU institutions, the focus of this report. (40 p.)



FOREIGN AND SECURITY POLICY / DEFENCE

INTERNATIONAL CRISIS GROUP

Seven priorities for the new EU High Representative

Former Spanish Foreign Minister Josep Borrell became the EU's chief diplomat, as the High Representative of the Union for Foreign Affairs and Security Policy. This paper argues that Borrell should guide Europe's focus to crises where its political ties, economic clout, and technical acumen can help forge peace and repair the ravages of war. This briefing suggests seven priorities that should command his attention. (12 p.)

EUROPEAN UNION INSTITUTE FOR SECURITY STUDIES

Strategic investment: making geopolitical sense of the EU's defence industrial policy

by Daniel Fiott [@DanielFiott](#)

The new EC President Ursula von der Leyen has called for a 'geopolitical Commission' and 'technological sovereignty' for the Union in strategic sectors. EU defence industrial strategy is likely to feature among such political ambitions, and the creation of a new Directorate General for Defence Industry and Space within the Commission – along with the financial resources endowed under the European Defence Fund – will raise questions about how EU institutions will view and attempt to influence the European defence sector. (49 p.)

EGMONT – ROYAL INSTITUTE FOR INTERNATIONAL RELATIONS

Putting the core at the centre: the crisis response operation core (CROC) and the future of PESCO

by Sven Biscop

The reader who cannot readily identify the meaning of CROC (Croque Monsieur? Croque Madame?) in the context of European defence can be forgiven. The CROC, the Crisis Response Operation Core, is among the least known acronyms. It deserves more attention however, for it ought to be at the centre of efforts to take Permanent Structured Cooperation forward. (5 p.)

EGMONT – ROYAL INSTITUTE FOR INTERNATIONAL RELATIONS

From global strategy to strategic compass: where is the EU heading?

by Sven Biscop

Does the EU need a "Strategic compass" to guide the implementation of the security and defence dimension of the EU global strategy (EUGS)? Does it need a military strategy perhaps? And what about a review of the EUGS itself? As Josep Borrell has assumed the post of High Representative, various proposals by member states and EU institutional actors are being discussed in Brussels. The wish for more strategic documents may reflect the complexity of the challenges that the EU is facing. It may also result from the inability to fully implement existing strategies. (4 p.)

EUROPEUM

The challenges of the military integration in the EU: an approach to the heterogeneity of weapon system categories

by Adrian Blasquez

The subject of EU's defence has been treated as a political challenge but less attention has been paid to the troubles it presents at the military level. This paper sheds light on the challenges that multiplicity

of weapon systems in Europe entails. The lack of joint procurement efforts is a phenomenon negatively affecting the European defence setup. Hence, the harmonization of defence materiel standards could constitute a key enabler for interoperability of forces. The paper reviews the collaborative projects that have taken place in the last decades and focuses on two initiatives launched at EU level: PESCO and the European Defence Fund. (8 p.)

NEDERLANDS INSTITUUT VOOR INTERNATIONALE BETREKKINGEN - CLINGENDAEL (NETHERLANDS INSTITUTE OF INTERNATIONAL RELATIONS)

Another solution with added value? The European intervention initiative as a new kid on the block of multinational defence cooperation

by Dick Zandee and Kimberley Kruijver [@KTKruijver](#)

European defence cooperation is characterised by a plethora of initiatives, in multilateral frameworks (EU, NATO) and in smaller bilateral or multinational formats. The European intervention initiative (EI2) is the latest of European efforts to enhance defence cooperation. The aim of this policy brief is to assess how EI2 fits in the wider landscape of European defence cooperation formats. (9 p.)

STOCKHOLM INTERNATIONAL PEACE RESEARCH INSTITUTE

The question of swarms control: challenges to ensuring human control over military swarms

by Maaïke Verbruggen [@M_Verbruggen](#)

The EU and its member states are increasingly investing in military swarm research, despite the significant challenges that exist in establishing human control over swarms. These challenges create tactical risks and increase the chances of undesired outcomes, such as conflict escalation and violations of international humanitarian law and ethical principles. The author argues that EU-funded swarm research programmes should take steps to address these issues. (15 p.)

ISTITUTO AFFARI INTERNAZIONALI

A long-term perspective on NATO and the multinational order

by Sinan Ülgen [@sinanulgen1](#)

The evolving external threat environment is impacting the internal political dynamics of NATO nations and is accentuating existing trends which affect the cohesiveness and the effectiveness of NATO as a political and military alliance. NATO's operational future over the next decades will be shaped by the ingenuity of the transatlantic leadership in developing new arrangements of institutional cooperation between the Alliance and the burgeoning forms of the "coalition of the willing". The Alliance should nonetheless remain the main transatlantic political forum, given Brexit as well as the rising need for a common political response to the many challenges ranging from migration to failed states. (17 p.)

VRIJE UNIVERSITEIT BRUSSEL - INSTITUTE FOR EUROPEAN STUDIES

Give me five! Key blocks to guide a European Green Deal for EU Foreign Policy on the geopolitics of decarbonisation

by Dennis Tänzler [@DennisTaenzler](#), Sebastian Oberthür [@OberthuerSeb](#) and Emily Wright [@speckledem](#)

Given the universal and cross-cutting nature of decarbonisation, what priorities should shape European foreign policy action in the decade ahead? How can the European Green Deal envisioned by Ursula von der Leyen help reshape relations with countries still dependent on fossil fuels or carbon-intensive assets and help them address related challenges? Foreign policy can support this process by making use of the entire diplomatic toolbox – including instruments related to trade, finance, security, and research and innovation – to promote more ambitious action on climate and energy and to diversify external relations away from fossil fuels. (13 p.)

CENTAR ZA MEĐUNARODNE I BEZBEDNOSNE POSLOVE (INTERNATIONAL AND SECURITY AFFAIRS CENTRE)

Europe & Japan and beyond

by Katarina Štrbac (ed.)

Due to the co-operative nature of the Common Security and Defence Policy (CSDP), partnerships are in the centre of successful crisis prevention, management and peacebuilding. Based on the strategic partnership agreement and the economic partnership agreement, the EU/Japan ties are closer than ever before. These two agreements also provide scope for closer sectorial ties in security and defence fields. These topics are high on the agenda of both partners, but also controversially discussed within the population. (61 p.)

DEUTSCHE GESELLSCHAFT FÜR AUSWÄRTIGE POLITIK (GERMAN COUNCIL ON FOREIGN RELATIONS)

The future of EU's Eastern Partnership beyond 2020. EU's engagement in a contested Eastern neighbourhood amidst internal crisis and geopolitical competition

by Cristina Gherasimov (ed.) [@cggherasimov](#)

Ursula von der Leyen asked the Commissioner for Neighbourhood and Enlargement to “take the Eastern Partnership to the next level” by proposing a new set of long-term policy objectives for the EaP. Sociopolitical and economic developments in the EaP countries, the EU's capacity to act and the rising influence of third powers in the region are among the main factors that have profoundly changed the nature of the relationship between the EU and its neighbourhood. This report analyses the factors that the EU should consider when engaging with the EaP countries in times of crisis and external pressure beyond 2020. (19 p.)

საქართველოს სტრატეგიისა და საერთაშორისო ურთიერთობების კვლევის ფონდი (GEORGIAN FOUNDATION FOR STRATEGIC AND INTERNATIONAL STUDIES)

Countering hybrid threats: stronger role for civil society in post 2020 EaP roadmap

by Kakha Gogolashvili, Mikayel Hovhannisyan, Elkhan Mehtiyev et al.

This paper has an ambition to advise on how civil society should and could be involved in formulating, implementing and monitoring the future deliverables in the area of hybrid threats in the post-2020 road map for the EaP policy, including developing specific deliverables with concrete benchmarks for individual countries in a regional perspective. The paper feeds directly into the debate on the new EaP road map and structured consultation opened by the EU institutions. (16 p.)

INSTITUTE FOR NATIONAL SECURITY STUDIES

The space arms race: global trends and state interests

by Zeev Shapira and Gil Baram [@Gil_Baram](#)

Today space is an arena with a significant impact on the security, military, economy, and daily routines of many countries around the world and has attracted many stakeholders. Global interest in the development of weapons for use in space - a process known as the “space arms race” - has increased. This article presents the current approaches to the weaponisation of space and the activities of the primary and secondary states in this arena. It discusses the similarities and differences between states active in space and their position regarding its weaponisation. (19 p.)

OSCE NETWORK OF THINK TANKS AND ACADEMIC INSTITUTIONS

European security: challenges at the societal level

by Wolfgang Zellner, Irina Chernykh, Alain Délétraz et al.

In the wake of the current confrontation between Russia and the West, will the nations of Europe govern their interactions by rules and principles, as the signatories of the Helsinki final act hoped, or by the conjuncture or clash of national interests, unmitigated by a code of behaviour? If by rules and principles, will those reflect shared values? Or are the values once deemed universal shared, in fact, only by certain elites? (40 p.)

TRADE

NOTRE EUROPE - JACQUES DELORS INSTITUTE

Greening the European Union's trade policy

by Pascal Lamy [@PascalLamyEU](#), Geneviève Pons [@genevieve_pons](#) and Pierre Leturcq [@pierre_leturcq](#)

Inevitably, trade policy in the upcoming years and beyond will have to find its place in Europe's new "Green Deal". The results of the special Eurobarometer survey on Europeans' attitudes on trade and EU trade policy published in November 2019 confirm the relevance of this research nexus. This note explores the inevitable changes in EU trade policy following the European elections of May 2019. (15 p.)

STOCKHOLM INTERNATIONAL PEACE RESEARCH INSTITUTE

Detecting, investigating and prosecuting export control violations: European perspectives on key challenges and good practices

by Sibylle Bauer and Mark Bromley

This report highlights the broad and growing set of difficulties that EU member states need to overcome when seeking to detect, investigate and prosecute export control

violations. In doing so, it details the range of approaches taken by states, outlines areas of good practice at the national level, and presents seven cases where export control violations have been detected, investigated and prosecuted. The report also includes a set of recommendations for steps that the EU could take to help to build national capacity and improve information sharing. (15 p.)

FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH EBERT FOUNDATION)

WTO reform: old debate, new realities

by Moshe Kao [@KaoMoshe](#)

The challenges faced by multilateralism include increased protectionism in the last few years, coupled with rapid changes to the global order – economic, socio-political and technological. The system is also facing unresolved and emerging challenges brought about by increasing inequality among and within nations. This paper provides a historic perspective to the debate on reforming the WTO, while noting that developing countries were the initial proponents of the reform agenda. (24 p.)

NOTRE EUROPE - JACQUES DELORS INSTITUTE

The WTO in crisis: can we do without multilateralism in the digital age?

by Elvire Fabry [@elvirefabry](#)

The US is trying to block one of the multilateral system's most important mechanisms: the WTO's court of appeal. WTO is the only multilateral institution with a dispute settlement mechanism ensuring compliance with the rules adopted by its 164 members. This brief explores the centrality of the role of the EU in keeping the balance and in avoiding the deadlocks of multilateralism, if the big powers – US, China, EU and even India – don't meet at the negotiating table. The ability of the EU to engage China in plurilateral formats will thus be more crucial than ever and requires much more coordination and cohesion between European capitals. (5 p.)

PETERSON INSTITUTE FOR INTERNATIONAL ECONOMICS

The WTO's existential crisis: how to salvage its ability to settle trade disputes

by Jeffrey J. Schott and Euijin Jung [@jung_euijin](#)

The WTO faces an existential crisis: a key component of its renowned process for settling trade disputes is about to go out of business and with it the certainty that WTO rights and obligations will be fully enforced. The factor precipitating this crisis is the US claim that the WTO Appellate Body, the top body that hears appeals and rules on trade disputes, has abused its authority by issuing expansive interpretations of WTO provisions while reviewing rulings by WTO dispute resolution panels – what trade lawyers call “judicial overreach.” (7 p.)

DEVELOPMENT

DEUTSCHES INSTITUT FÜR ENTWICKLUNGSPOLITIK (GERMAN DEVELOPMENT INSTITUTE)

The future of European development finance: institutional reforms for sustainable solutions

by Benedikt Erforth and Lennart Kaplan [@LennartKap](#)

This paper discusses the future of European development finance against the backdrop of climate change, migration flows, and security. It argues that EU development financing is plagued by conflicting national and supranational interests. The authors argue that institutional and content-related interests need to be better aligned if development financing is to be made more efficient and more sustainable. (4 p.)

ASIA-OCEANIA

VRIJE UNIVERSITEIT BRUSSEL - INSTITUTE FOR EUROPEAN STUDIES

Moon Jae-In's policy towards multilateral institutions: continuity and change in South Korea's global strategy

by Ramon Pacheco Pardo [@rpachecopardo](#), Tongfi Kim [@tongfi_kim](#), Linde Desmaele [@dsm_ld](#) et al.

What drives President Moon Jae-in's policy towards multilateral institutions? The Moon government has made participation in global governance a cornerstone of its foreign policy. The government has been a strong supporter of multilateralism. This is non-negotiable for Seoul. This report seeks to map out and analyse the Moon government's policy towards key multilateral institutions operating in the areas of security, economics and sustainable development. It also seeks to explain the key drivers underpinning this policy. (39 p.)

EASTERN EUROPE

FORUM FOR RESEARCH ON EASTERN EUROPE AND EMERGING ECONOMIES (FREE NETWORK) / БЕЛАРУСКИ ЭКАНАМІЧНЫ ДАСЛЕДЧА-АДУКАЦЫЙНЫ ЦЭНТР (BELARUSIAN ECONOMIC RESEARCH AND OUTREACH CENTER)

Can loose macroeconomic policies secure a 'growth injection' for Belarus?

by Dzmitry Kruk

After a relatively long period of macroeconomic stabilization, Belarus faces the threat of a purposeful deviation from it. However, today there is no room for a 'growth injection' by means of monetary policy. Moreover, Belarus still suffers from a problem of unanchored inflation expectations. This prevents monetary policy from being effective and powerful. (4 p.)

KONRAD-ADENAUER-STIFTUNG

Ernüchternder Neustart

by Tim B. Peters, Vasyl Mykhailishyn and Isabel Weininger
[@IsabelWeininger](#)

The heads of state or government of Germany, France, Russia and Ukraine met again after three years in Normandy format - with manageable results. A certain disillusionment is also evident in domestic politics after six months in office of the new Ukrainian President Zelenskyy. (DE - 6 p.)

LATIN AMERICA AND THE CARIBBEAN

ISTITUTO AFFARI INTERNAZIONALI

Turmoil in South America and the impact on energy markets

by Lisa Viscidi [@lviscidi](#)

2019 has been marked by widespread uprisings throughout Latin America. Largely fuelled by anger over graft, economic disparity, and the rising cost of living, the resulting social unrest has led to uncertainty over the energy sector outlook. Continued political and social turbulence will likely contribute to stagnant oil and gas production growth in these countries. Conversely, Brazil and Guyana are on track to become the region's largest oil producers. (17 p.)

FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH EBERT FOUNDATION)

Zwischen Klimawandel und sozialen Unruhen : Chiles Klimapolitik als Gastgeber der UN-Konferenz 2019

by Alexandra Tost and Simone Reperger

Chile chaired the UN climate change conference in 2019. Due to the mass protests against government policy, social inequality and the neoliberal economic model, the COP 25 was relocated to Madrid for a short time. Chile is still a long way from the announced pioneering role in climate protection. Although the "host country" is badly affected by climate change and numerous ecological conflicts, there are hardly any ambitious policies to date. Civil

society organizations emphasize that the ecological crisis is also a social crisis. (DE - 14 p.)

WOODROW WILSON INTERNATIONAL CENTER FOR SCHOLARS

Venezuela and Cuba: the ties that bind

by Brian Fonseca [@BrianPFonseca](#), John Polga-Hecimovich [@jpolga](#) and Richard E. Feinberg

These two essays explore the history and evolution of the Venezuelan-Cuban relationship and the interests of each country at different points in time. They also analyse the evolving relations between Cuba and Venezuela within the context of the Caribbean Basin and their powerful northern neighbour, the US. (32 p.)

MIDDLE EAST / NORTH AFRICA (MENA)

EURO-MEDITERRANEAN STUDY COMMISSION

Who owns what? Free trade policies, migration management and the ambiguity of "joint ownership"

by Sherin Gharib

This paper investigates the EU's concept of joint ownership. Drawing of two case studies, namely free trade policies and migration management, the paper analyses the implications and limitations of the EU's partnership relation with its southern neighbourhood. It focuses mainly on the Egyptian, Tunisian and Moroccan cases. Due to the vague definition of "joint ownership", it suggests two types of ownership: governmental ownership and societal ownership. Using this conceptualisation, it analyses the involvement of different stakeholders and the main beneficiaries of EU free trade policies and migration management. (50 p.)

INSTITUTE FOR NATIONAL SECURITY STUDIES

Arab Spring 2.0? Making sense of the protests sweeping the region

by Sarah J. Feuer [@sjfeuer](#) and Carmit Valensi

The ongoing protests across Iraq and Lebanon have invited references to a second Arab Spring. The unrest comes on the heels of protests in Egypt, Jordan, Algeria, a mobilization in Sudan, and the recent mass demonstrations in Iran. These episodes reflect a broader struggle on two fronts: within each country, between the public and the political leadership over the basic contours of the social contract; and between various camps wishing to see a regional order that will reflect their preferences on such core issues as Iran's presence across the Middle East, the integrity of territorial states, relations with the West, sectarianism, and democracy. (4 p.)

ÖSTERREICHISCHE INSTITUT FÜR INTERNATIONALE POLITIK (AUSTRIAN INSTITUTE FOR INTERNATIONAL AFFAIRS)

Was wurde aus den Revolutionen im Nahen Osten und Nordafrika?

by Cengiz Günay [@cengizkhan](#)

Nine years after the events of the Arab Spring, the MENA region is again affected by a wave of protests. This analysis takes a close look at what has and has not changed since the 2010/11 uprisings and what the structural, economic and political backgrounds for the ongoing instability and unrest are. (DE - 10 p.)

WOODROW WILSON INTERNATIONAL CENTER FOR SCHOLARS

Ready for work: an analysis of workforce asymmetries in the Middle East and North Africa

by Merissa Khurma [@MerissaKhurma](#), Alexander Farley and Kent Hughes

The workforce challenge is among the most complex and urgent socio-economic and political challenges facing the MENA today.

The growth of large and youthful populations is colliding with the constraints of slow growth and investment, which makes it impossible for regional markets to absorb surplus labour. This report presents an analysis of workforce development drawing from primary research conducted in Jordan, Tunisia, and Oman. (148 p.)

EGMONT – ROYAL INSTITUTE FOR INTERNATIONAL RELATIONS

Returnees in the Maghreb: a European perspective

by Thomas Renard [@tom_renard](#)

More than 10,000 individuals travelled from Europe and North Africa to fight in Syria and Iraq. Now, Europe and North Africa are dealing with the challenge of returning foreign fighters, mostly separately. This policy brief looks at the inter-regional dimension of the returnees' challenge, at why Europe should care more about North Africa's ability (or not) to craft effective policies, and how it could help – with a focus on the EU. (6 p.)

INSTITUTE FOR NATIONAL SECURITY STUDIES

The perils of the Turkey-Libya maritime delimitation deal

by Gallia Lindenstrauss [@GLindenstrauss](#), Sarah J. Feuer [@sjfeuer](#) and Ofir Winter [@ofirwinter](#)

The November 2019 signing of the maritime delimitation agreement between Turkey and the internationally recognized Government of National Accord in Tripoli, led by Prime Minister Fayez al-Sarraj, has heightened concerns among many countries in the Eastern Mediterranean. The deal will negatively affect Turkey's relations with Greece, Cyprus, Egypt, and Israel; pose further challenges to the already questionable plans for the EastMed pipeline; and raise the stakes for outside actors involved in the Libyan civil war. It may, however, have a boomerang effect from Ankara's perspective in that it strengthens Egypt's determination to become an energy hub for the region. (4 p.)

ASIA FOUNDATION

[Afghanistan in 2019: a survey of the Afghan people](#)

by Tabasum Akseer and John Rieger (eds.)

The longest-running barometer of Afghan opinion, the survey of the Afghan people is a map of social change over time, presenting a clear picture of the gains and gaps that Afghans perceive in a rapidly transforming nation. The survey has gathered the views of more than 129,000 Afghans since 2004 on security, elections, governance, the economy, essential services, corruption, youth issues, reconciliation with the Taliban, access to media, migration, the role of women, and political participation. (333 p.)

WESTERN BALKANS

EVROPSKÉ HODNOTY (EUROPEAN VALUES)

[Vulnerabilities to Russian influence in Montenegro](#)

by Liz Anderson

With a population of a little more than 650,000 citizens, Montenegro is NATO's newest and smallest member, joining the Alliance in 2017. However, Russian influence in the country remains significant and has shown no signs of going away. This influence is seen in nearly all levels of Montenegrin society. This poses a major threat not only to Montenegro, but to the broader WB region and to both NATO and the EU. It also damages Montenegro's chances of EU accession in 2025, which the majority of the population supports. (20 p.)

ÖSTERREICHISCHE INSTITUT FÜR INTERNATIONALE POLITIK (AUSTRIAN INSTITUTE FOR INTERNATIONAL AFFAIRS) / INTERNATIONAL INSTITUTE FOR PEACE/RENNER INSTITUT

[Young generations for new Balkans visit EU institutions. Vision 2030](#)

Caught in a vicious circle between old-fashioned politics and nationalisms on the one hand, and lack of economic, educational and social perspectives on the other, young

generations in the Balkans seem to be losing patience and, when possible, emigrating to the West in search for a better life. This publication sets the spotlight on youth, their progressive stances and hopes for the future. It discusses the overall socio-political situation in the WB and EU and NATO integration. (25 p.)

CENTAR ZA MEĐUNARODNE I BEZBEDNOSNE POSLOVE (INTERNATIONAL AND SECURITY AFFAIRS CENTRE) / HEINRICH-BÖLL-STIFTUNG / FRENCH INSTITUTE OF INTERNATIONAL RELATIONS / ALSHARQ FORUM

[Post “zero problems with neighbours” in the Western Balkans, a view from Serbia](#)

by Igor Novaković, Jovana Bogosavljević and Natan Albahari

At the beginning of this decade Turkish foreign policy was grounded in the idea of “zero problems with neighbours”, a proactive policy that should have renewed Turkey's position at the centre of the wider region. In the Balkans, this proactiveness has largely dissipated at the beginning of the century and is now barely visible. Bearing in mind that Turkey is one of the most important countries for the region, this paper tries to provide a summary of relevant issues regarding Turkey's position in the Western Balkans. (30 p.)

EUROPEUM

[Eastern monitor: the European dream of the Western Balkans – 20 years in a limbo](#)

by Jana Juzová

Despite the encouraging statements by Commission's President Juncker in 2017 following the introduction of Commission's strategy for the WB, this year's developments are a testament to continued enlargement fatigue amongst EU member states. Since the acknowledgement of the WB countries as potential candidates for EU membership at the European Council summit in 2000, it could seem that the region has not progressed remarkably. (7 p.)

CHINA

INSTITUTE FOR SECURITY AND DEVELOPMENT POLICY

China and the EU: “strategic partners” no more

by Axel Berkofsky

This brief analyses EU's relationship with China and how the narrative has changed from 2003, when Brussels' policymakers stated the EU and China relationship was a “strategic partnership”. (5 p.)

RAHVUSVAHELINE KAITSEUURINGUTE KESKUS (INTERNATIONAL CENTRE FOR DEFENCE AND SECURITY)

The Talsinki tunnel: channelling Chinese interests into the Baltic Sea

by Frank Jüris

In Northern Europe, China is interested in developing the polar silk road which could significantly cut down the transit time between Asia and Europe and provide alternative route to the target European market. The Tallinn–Helsinki connection should be seen as part of this route. This paper analyses Chinese strategic interests through the BRI initiative in general and the polar silk road in particular. (16 p.)

EUROPEUM

Sleeping dragon no longer: China's influence in Central Europe

by Louis Cox-Brusseau [@LouisCB01](#)

China's influence in a given region is usually measured in terms of economic investment and diplomatic relations; this is true of Central Europe, where foreign direct investment from Chinese businesses has increased over the past decade, often in tandem with an increase in political dialogue. However, assessing exactly how much influence China wields in Central Europe poses a significant analytical challenge from a data-gathering point of view and from an ideological one, given that Chinese involvement in European industry and

politics tends to provoke very polarised reactions. (6 p.)

DANISH INSTITUTE FOR INTERNATIONAL STUDIES

China, the Middle East, and the reshaping of world order - The case of Iran

by Lars Erslev Andersen [@LarsErslev](#)

In the years 2014 – 2018, China concluded partnership agreements with at least 13 states in the Middle East, and has established its first naval base in Djibouti. It has increased economic investment and trade in energy, infrastructure construction, and nuclear energy, satellites and new energy resources. This raises the question whether China is about to replace the US in the Middle East and thus initiate a China-US rivalry in the region? This paper takes China's policy towards Iran after the renewed US sanctions following the withdrawal from the Iran 2015 nuclear deal as a litmus test for China–US relations in the Gulf. (25 p.)

INDIA

FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH EBERT FOUNDATION)

Industrial revolution 4.0 and the impact on automotive sector

by Kazim Rizvi [@kazimriz](#) and Pranav Bhaskar Tiwari [@pranavbtwari](#)

There are many nuances to the debate around Industry 4.0. The most heated are those around automation and its implications on the future of work. Nearly every manufacturing industry, automobiles included, will see the nature of work metamorphose substantially. This brief provides recommendations harping on the need for up-skilling, the only panacea to exponential technologies disrupting our world, and our work. Most often in India, skilling starts when the worker is an adult. The future of work demands that vocational training start early, in school. (30 p.)

RUSSIA

NOTRE EUROPE - JACQUES DELORS
INSTITUTE

Russian gas pipelines and the European Union: moving from a love-hate relationship “with adults in the room”?

by Jean-Arnold Vinois and Thierry Bros [@thierry_bros](#)

For more than 20 years, in the energy area, the relationship between Russia and the EU is too often governed by gas pipelines. The annexation of Crimea in 2014 followed by the western sanctions on Russia and the rampant war in Eastern Ukraine made the Russian pipeline projects a major source of division between the member states of the EU. This brief tries to identify the main problems raised by the Russian projects and to examine whether and how these problems could be solved for the benefit of all the parties concerned, on a long term basis. (18 p.)

CHATHAM HOUSE - THE ROYAL
INSTITUTE OF INTERNATIONAL AFFAIRS

Russian economic policy and the Russian economic system: stability versus growth

by Philip Hanson

Russia's economic management is currently praised for its achievement of macroeconomic stability. Inflation has been brought down; the budget is in surplus; national debt is low; and the reserves are ample. At the same time, there is much criticism of the failure at present to secure more than very slow economic growth. (22 p.)

EVROPSKÉ HODNOTY (EUROPEAN
VALUES)

Kremlin watch strategy for countering hostile Russian interference

by Jakub Janda [@_JakubJanda](#) and Veronika Vichova
(eds.)

2019 marks five years of highly aggressive behaviour by the Russian Federation

towards Western democracies. When Russia started a war against Georgia occupying a fifth of its territory in 2008, the West failed to respond, naively believing that it could appease an aggressor. In 2014, President's Putin regime started the war against Ukraine, and at the same time, Moscow began to mobilize intensive hostile influence operations against Western democracies. This paper offers a response with 20 specific measures for national governments which European countries must implement. (18 p.)

TURKEY

ULKOPOLIITTINEN INSTITUUTTI (FINNISH
INSTITUTE OF INTERNATIONAL AFFAIRS)

Turkey's Republican People's Party and the EU: preconditions for EU-Turkey relations in the secular-nationalist vision

by Toni Alaranta [@ToniAlaranta](#)

After 17 years of the Islamic-conservative AKP's electoral hegemony, the secular-nationalist Republican People's Party achieved significant success in the recent municipal elections in March 2019, and is now increasingly challenging President Recep Tayyip Erdoğan. (11 p.)

ÚSTAV MEZINÁRODNÍCH VZTAHŮ
(INSTITUTE OF INTERNATIONAL
RELATIONS PRAGUE)

Syřané v Turecku: Neudržitelný rozvoj?

by Kristýna Kucerova

This paper is focusing on the second wave of projects financed through the so called EU facility for refugees in Turkey. How is the situation of Syrians in Turkey affected by the economic crisis and local elections in Turkey? Are the prospects of return to Syria realistic, particularly in the context of the current Turkish intervention? And how are the projects dealing with the instability in the country and its surroundings? (CZ - 7 p.)

UNITED STATES OF AMERICA

ATLANTIC COUNCIL

Leading the free world: how America benefits

by Paul D. Miller [@PaulDMiller2](#)

This report is about the free world: what it is, why it is imperiled, why Americans should care, and what can be done about it. Some skeptics have criticized the international order. President Donald Trump regularly criticizes “globalism,” and many Americans seem inclined to believe that the US is losing its sovereignty and that the world is taking advantage of America’s generosity. (26 p.)

ATLANTIC COUNCIL

US-China collaboration on the Internet of things safety: what next?

by Karl Frederick Rauscher

The Internet of things (IoT) describes a future world with pervasive connectivity. This report notes that the world’s two largest powers are at a crossroads with regard to their level and scope of cooperation in continued IoT advances. It analyses possibilities for the US and China to work together to establish consensus policies and standards to make their societies safer and provide a model for the world. (48 p.)

SECTION 4 - EU MEMBER STATES



CZECH REPUBLIC

EUROPEUM

Jednání o VFR: Co si Češi myslí o nejnovějším vývoji

by Vít Havelka [@Havelka_Vit](#)

This paper focuses on the latest MFF negotiations from a Czech perspective. It aims to outline the Czech position towards the MFF, explain what is at stake for the Czech Republic and why the Czechs still stand against certain aspects of the current EC proposal. It also outlines the expected future steps of the Czech government. (CZ - 4 p.)

DENMARK

DANISH INSTITUTE FOR INTERNATIONAL STUDIES

Intensifying great power politics in the arctic - point of consideration by the Kingdom of Denmark

by Mikkel Runge Olesen and Camilla Tenna Nørup Sørensen

The Arctic is increasingly becoming a region marked by great power competition between the US, Russia and China. This has caused trouble for the Nordic countries in the Arctic, who have had to handle and defuse potential tensions with both Russia and China and at the same manage relations with the US, whose new approach openly focuses on Russia and China as strategic competitors in the Arctic. This report looks into the experiences of Finland, Norway and Iceland in dealing with this dilemma with the aim of

identifying points for consideration by Denmark. (52 p.)

GERMANY

MIGRATION POLICY INSTITUTE

Integrating refugees and asylum seekers into the German economy and society: empirical evidence and policy objectives

by Herbert Brücker, Philipp Jaschke [@Philipp_Jaschke](#) and Yuliya Kosyakova [@YuliyaKosyakova](#)

Germany has become a top destination for asylum seekers in the EU, receiving around half of the 3.1 million asylum applications submitted between 2015 and 2017. In response, German policymakers have adopted a variety of strategies to support the integration of newcomers - an effort that is of crucial importance to both refugees and the broader society. (36 p.)

FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH EBERT FOUNDATION)

Le pays d'immigration pragmatique : ce que les Allemands pensent de l'immigration

by Rainer Faus [@rainerfaus](#) and Simon Storks

What do the Germans really think about immigration? Is the population really divided? How do citizens assess their government's integration policy? This study shows that the largest group of respondents displayed extremely nuanced opinions. The perception of immigration is not emotionally driven, but pragmatic. In general, Germans see immigration as an opportunity but also have doubts about how politics can rise to the challenges. (FR - 14 p.)

ZENTRUM FÜR EUROPÄISCHE WIRTSCHAFTSFORSCHUNG (CENTRE FOR EUROPEAN ECONOMIC RESEARCH)

Do people really want a simple tax system? Evidence on preferences towards income tax simplification

by Sebastian Blesse, Florian Buhlmann and Philipp
Doerrenberg

This study analyses preferences in Germany for tax simplification. The general wisdom seems to suggest that most tax systems are overly complex and that tax simplification is generally desirable. The study investigates if the high support for tax simplification is driven by a lack of awareness about the trade-offs behind simple and complex tax systems. (79 p.)

GREECE

ΕΛΛΗΝΙΚΟ ΊΔΡΥΜΑ ΕΥΡΩΠΑΪΚΗΣ ΚΑΙ ΕΞΩΤΕΡΙΚΗΣ ΠΟΛΙΤΙΚΗΣ (HELLENIC FOUNDATION FOR EUROPEAN FOREIGN POLICY)

Asylum-seekers' integration: the time has come

by Haris Malamidis

Although four years have passed since the 2015 refugee "crisis", Greece's reception system is still inadequate in serving the needs of the arriving populations. Since current debates focus on the weaknesses of the reception system, the issue of asylum-seekers and refugees' integration has been indirectly outweighed. This policy brief argues that the current political, social and environmental developments highlight the need to move towards decentralized and locally-oriented integration policies. (14 p.)

ΕΛΛΗΝΙΚΟ ΊΔΡΥΜΑ ΕΥΡΩΠΑΪΚΗΣ ΚΑΙ ΕΞΩΤΕΡΙΚΗΣ ΠΟΛΙΤΙΚΗΣ (HELLENIC FOUNDATION FOR EUROPEAN FOREIGN POLICY)/ CEASEVAL RESEARCH ON THE COMMON EUROPEAN ASYLUM SYSTEM

Borders and the mobility of migrants in Greece

by Angeliki Dimitriadi [@DimitriadiA](#) and Antonia-Maria
Sarantaki

The research seeks to show how bordering processes are implemented when confronted with the mobility of migrants at different stages, with a particular focus due to Greece's position at the external border, on interception on entry, and transit or secondary movement from Greece. The report documents the experiences and perceptions of border agents and actors involved in bordering processes, at the external border but also within Greece and of migrants arriving in Greece post 2015. (54 p.)

FRANCE

DEUTSCHES INSTITUT FÜR WIRTSCHAFTSFORSCHUNG (GERMAN INSTITUTE FOR ECONOMIC RESEARCH)

Merger efficiency gains: evidence from a large transport merger in France

by Ariane Charpin and Joanna Piechuka

This paper exploits a large and highly debated merger that took place in the French transport industry to evaluate whether a merger between two major transport groups may give rise to merger efficiency gains. It exploits the industry setting to employ a difference-in-differences methodology evaluating the effect of the merger on operating costs of merging transport groups. The results show that the merger did not lead to any merger specific efficiency gains for the merging parties. (31 p.)

CENTRE FOR CLIMATE CHANGE
ECONOMICS AND POLICY / GRANTHAM
RESEARCH INSTITUTE ON CLIMATE
CHANGE AND THE ENVIRONMENT

The impact of energy prices on
socioeconomic and environmental
performance: evidence from French
manufacturing establishments,
1997-2015

by Giovanni Marin and Francesco Vona

The impact of environmental policies on business performance is a longstanding and controversial topic. The authors of this paper contribute to this debate by evaluating the responses of French manufacturing firms to large increases in energy prices, which the authors use as a proxy for stringent environmental policy. They evaluate the influence of energy prices on socioeconomic and environmental performance for the period 1997–2015. (53 p.)

ITALY

FRIEDRICH-EBERT-STIFTUNG (FRIEDRICH
EBERT FOUNDATION)

Parteiensystem und
Parteienwettbewerb in Italien

by Piero Ignazi

The Italian party system remained almost unchanged for almost 50 years, from the post-war period to 1994. In the wake of the "mani pulite" corruption scandal, traditional parties disbanded and a multitude of new parties and political movements emerged. The rapid rise of the anti-establishment movement Movimento 5 Stelle (M5S) upsets Italy's party landscape. The government crisis in summer 2019 led to a surprising government of M5S and Partito Democratico. The Italian party system is changing again and could develop again in the direction of bipolarism. (DE - 10 p.)

CYPRUS

ΚΥΠΡΙΑΚΟ ΚΕΝΤΡΟ ΕΥΡΩΠΑΪΚΩΝ ΚΑΙ
ΔΙΕΘΝΩΝ ΥΠΟΘΕΣΕΩΝ (CYPRUS CENTER
FOR EUROPEAN AND INTERNATIONAL
AFFAIRS)

Territory, ethnicity and divided
societies: the Cyprus question

by Anna Parrilli

The article addresses the Cyprus question by investigating the interrelations between the two ethnic communities and the territory through the lens of comparative constitutional law. It examines the interrelations between territory and ethnicity within the broader context of constitutional law studies. It also deals with territorial demarcation and the recognition of ethnic groups as the constitutive elements of the state. Particular attention is devoted to territorial instruments of self-government, as well as linguistic and cultural rights directly connected to territorial demarcation. (21 p.)

HUNGARY

KÜLÜGYI ÉS KÜLGAZDASÁGI INTÉZET
(INSTITUTE FOR FOREIGN AFFAIRS AND
TRADE)

Hungary's Eastern opening: political
and economic impacts

by Lisa Irimescu

This brief seeks to understand the political and economic impacts of Hungary's "Eastern opening" policy. Despite nearly ten years of this turn to the East – specifically China – this brief finds that the outcomes of the policy are negligible. It recommends that the government focus on helping Hungarian firms break into the Chinese market, build human capital, develop foreign direct investment game plans for Chinese investors, and rebrand the Budapest–Belgrade railway as infrastructure to export Hungarian goods to the Balkan nations. It argues that the government must focus on using its partnership with China to empower Hungarian, rather than Chinese firms. (12 p.)

THE NETHERLANDS

NEDERLANDS INSTITUUT VOOR
INTERNATIONALE BETREKKINGEN -
CLINGENDAEL (NETHERLANDS INSTITUTE
OF INTERNATIONAL RELATIONS)

European seaports and Chinese strategic influence - the relevance of the maritime silk road for the Netherlands

by Frans-Paul van der Putten

Chinese investments in European seaports have increased rapidly in recent years. This process is part of China's BRI initiative and its maritime component, the maritime silk road (MSR). To better understand the relevance for Europe and the Netherlands of Chinese investments in European ports, this report discusses two main questions: what is the relevance of Chinese involvement in European ports for China's political influence in the EU? What are the long-term implications for the Netherlands of the MSR, in particular in regard to Chinese involvement in European ports? (33 p.)

CENTRAAL PLANBUREAU (CPB)

Zorgen om morgen

by Yvonne Adema and Iris van Tilburg

The balance of Dutch public finances has changed from a small surplus in 2014 to a deficit of 1.6% of gross domestic product (GDP), or 16 billion euros. This is mainly the result of government policy and an increase in health care expenditure. Without additional policies, future generations cannot benefit from the same government facilities as people today. (NL - 72 p.)

POLAND

FORUM FOR RESEARCH ON EASTERN
EUROPE AND EMERGING ECONOMIES
(FREE NETWORK)

From partial to full universality: the Family 500+ programme in Poland and its labour supply implications

by Michał Myck and Kajetan Trzciński

The implementation of the 'Family 500+' programme in April 2016 represented a significant shift in public support for families with children in Poland. The programme guaranteed 500 PLN/month (approx. 120 euros) for each second and subsequent child in the family and the same amount for the first child in families with incomes below a specified threshold. As of July 2019, the benefit has been made fully universal for all children aged 0-17, an extension which nearly doubled its total cost and benefited primarily middle and higher income households. (5 p.)

SLOVAKIA

SLOVENSKÁ SPOLOČNOSŤ PRE
ZAHRANIČNÚ POLITIKU (SLOVAK
FOREIGN POLICY ASSOCIATION)

Arms control – the ultimate challenge: perspective from Slovakia

by Klaudia Tóth (ed.)

States are violating or withdrawing from arms control frameworks and agreements, new weapons technologies are being developed and geopolitical competition is on the rise. The European security architecture will be seriously weakened by these challenges. From the Slovak perspective, these challenges may seem more global and remote; nonetheless, their implications could have a significant impact on the security environment. Therefore, Slovakia has to start focusing on foreign and security policy in relation to arms control. (17 p.)

UNITED KINGDOM

INSTITUTE FOR GOVERNMENT

A second independence referendum: when and how could Scotland vote again?

by Akash Paun [@AkashPaun](#), Jess Sargeant [@Jess_Sargeant](#) and Kelly Shuttleworth [@KellyShuttlew13](#)

The Scottish government is demanding a second independence referendum, but the UK prime minister, Boris Johnson, has ruled out giving consent for one. He has the legal right to do so – but if Scotland continues to vote for pro-independence parties, a second referendum may become all but impossible to resist. This paper considers when and how such a vote might take place and the factors that would make it seem more – or less – legitimate. (33 p.)

BREXIT

LSE IDEAS

High hopes, long odds: on the false promises of Brexiteer deals with the EU and US

by John Ryan, Gabriel Felbermayr [@GFelbermayr](#), Clemens Fuest [@FuestClemens](#) et al.

This report explores a no-deal Brexit which would leave the UK economically, politically and diplomatically weakened and isolated. It further examines the relationships with its two main allies - the EU and the US - which would become more difficult and complicated. (35 p.)

UK IN A CHANGING EUROPE

The border into Brexit: perspectives from local communities in the central border region of Ireland/Northern Ireland

by Katy Hayward [@hayward_katy](#) and Milena Komarova [@milena_komarova](#)

The paper presents findings of a project on the impacts of Brexit and the possible implications of a 'no deal' scenario on the

central border region of Ireland/Northern Ireland. (45 p.)

ÖSTERREICHISCHE GESELLSCHAFT FÜR EUROPAPOLITIK (AUSTRIAN SOCIETY FOR EUROPEAN POLITICS)

Brexit, the Irish shamrock and the English rose

by Melanie Sully

Relations between the Emerald Isle with its symbol the shamrock, and the rose the heraldic emblem of England, have been historically fraught. Brexit has unleashed unwanted attention, reviving old wounds. This paper examines some of the most vexed issues in the awkward relationship between the UK and the Republic of Ireland, two countries which joined the European club together. Brexit means that these two are now destined to go separate ways, with all the complications that brings. (7 p.)

INSTITUTE OF INTERNATIONAL AND EUROPEAN AFFAIRS

Brexit status report: 2016-2019 and beyond

by Dáithí O'Ceallaigh, Paul Gillespie and Andrew Gilmore

This report features short pieces by authors from across the UK and Ireland. It provides an account of the key events since the referendum, the response to Brexit within the UK and the EU to date, and the implications for Ireland and Northern Ireland of the events of the last three years. (168 p.)



STOCKHOLM INTERNATIONAL PEACE RESEARCH INSTITUTE

The geopolitics of a changing Arctic

by Ekaterina Klimenko

This paper aims to examine the complexity of Arctic security and explore the interconnectedness between various aspects of security in the Arctic. It also investigates the challenges in the Arctic that arise from changing geo-political realities. (15 p.)

ISTITUTO AFFARI INTERNAZIONALI

The geopolitics of critical minerals

by Sophia Kalantzakos [@skalantzakos](#)

The decarbonisation of the global economy and the new wave of technological evolution, featuring artificial intelligence and 5G networks, fuel the race to secure uninterrupted access to critical minerals. Traditional industrial actors (the US, the EU and Japan) are pitted against China and its global BRI initiative. Understanding how the high geographic concentration of rare earths, lithium and cobalt often creates hotspots of contention especially in unstable parts of the world, offers instructive indications of how the race to decarbonise and digitalise the global economy will contribute to shaping geopolitics in the years to come. (15 p.)

CHATHAM HOUSE - THE ROYAL INSTITUTE OF INTERNATIONAL AFFAIRS

The application of international law to state cyberattacks: sovereignty and non-intervention

by Harriet Moynihan

Hostile cyber operations by one state against another state are increasingly common. It is estimated that over 22 states are responsible for sponsoring cyber operations that target other states. Cyber operations that cause injury or death to persons or damage or destruction of objects could amount to a use of force or armed attack under the UN Charter. But in practice, the vast majority of cyber operations by states take place below the threshold of use of force, instead consisting of persistent, low-level intrusions that cause harm in the victim state but often without discernible physical effects. (61 p.)

STIFTUNG WISSENSCHAFT UND POLITIK (GERMAN INSTITUTE FOR INTERNATIONAL AND SECURITY AFFAIRS)

Cooperation, trust, security? The potential and limits of the OSCE's economic and environmental dimension

by Franziska Smolnik

In the context of a European security order under pressure, the OSCE – and its long neglected economic and environmental dimension – has developed a new dynamism. The potential for generating trust in this area is attributed to the idea that economics and the environment are supposedly less sensitive issues to cooperate on. The assumption is that this trust can subsequently have a positive effect on cooperation in other fields, and contribute to greater security in Europe as a whole. (32 p.)

INSTITUT FÜR WELTWIRTSCHAFT KIEL
(KIEL INSTITUTE FOR THE WORLD
ECONOMY)

**More development, less emigration to
OECD countries - Identifying
inconsistencies between cross-
sectional and time-series estimates of
the migration hump**

by David Benček and Claas Schneiderheinze

Comparing the emigration rates of countries at different stages of economic development, an inverse u-shape emerges. Since the peak is located at rather high per capita incomes of 6000–10 000 USD policy makers in rich destination countries worry that supporting economic development in poor origin countries might increase migration. Using 35 years of migration flow data from 198 countries of origin to OECD destinations, the study successfully reproduces the hump-shape in the cross-section. However, more rigorous fixed effects panel estimations show a negative association between income and emigration. (30 p.)

OVERSEAS DEVELOPMENT INSTITUTE

**Reaching universal health coverage: a
political economy review of trends
across 49 countries**

by Anthony McDonnell [@apmcdonnell](#), Ana F. Urrutia
and Emma Samman

This paper aims to understand why and how countries provide health coverage, particularly to left-behind groups. To address these questions, it identifies 49 geographically, economically and culturally diverse countries that have either achieved universal health coverage or have made good progress towards it. This paper synthesises the existing literature and identifies global and regional trends underlying progress, as well as the enablers, strategies and constraints each country faced in trying to expand healthcare. (40 p.)

RAHVUSVAHELINE KAITSEUURINGUTE
KESKUS (INTERNATIONAL CENTRE FOR
DEFENCE AND SECURITY)

**Seeing is no longer believing:
deepfakes, cheapfakes and the limits of
deception**

by Emilia Anna Porubcin

Claiming another person's identity is a practice that stretches all the way from ancient Rome to imperial Russia. Today's technology has introduced a bevy of tools that enhance and complicate duplicity online. One such tool has garnered significant interest from academia, industry, and the public, in recent years: deepfakes. This paper explores the social and political ramifications of deepfakes. (21 p.)